

**All corrections to notes on this calendar should be filed no later than 12 P.M. (Noon) on 11/10/08. Document filed after this time may not be reviewed prior to hearing and could result in a continuance of your case. The update to these notes will be posted in the late afternoon of the following day.**

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**The Probate Examiners can be reached at ProbateNotes@courts.sbcounty.gov. Emails must have the case identification information and hearing time/date in the subject line. No attachments will be opened. Probate Examiners can only respond to inquiries regarding the meaning of comments in the notes. PLEASE DO NOT SEND EMAILS TO STATE THAT DOCUMENTS HAVE BEEN FILED, TO REQUEST A CONFIRMATION OF WHETHER DOCUMENTS HAVE BEEN RECEIVED, OR TO REQUEST THE CLEARING OF NOTES. No legal or procedural advice may be given.**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR  
HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: CONPS0700177

CASE NAME: \*\*\* MF \*\* EARNEST MICKENS

HEARING:

FIRST & FINAL Account and Report of MYRTLE ANN GOSNELL and Petition for fees

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
EARNEST MICKENS	(CEP)...SCOTT SOADY
MYRTLE ANN GOSNELL	(PCR)...EDWARD B FISCHER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1st & final account and petition for fees and final distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Court appointed conservator 9/10/07, \$30,000 bond. Letters issued 10/18/07.
2. Accounting period covers 10/18/07 – 7/2/08 (date of death of conservatee).
3. Assets on hand \$3,000.00.
4. Need supporting schedules to the summary of account for Distributions to conservatee, other credits and assets on hand.
5. Schedule of receipts do not have description of source of income for 3 receipts totaling \$345.80. Need verified supplement.
6. Disbursement on 2/29/08 in the amount of \$1,800.00. Question the purpose of this payment. Need verified supplement.
7. Attorney requests fees of \$2,586.50. Billing is based on a rate for attorneys at \$190-\$250/hour and for paralegal at \$30/hour. Need paralegal qualifications per CRC 7.703.

RECOMMENDATION:

Need to clear notes. If approved, court to set hearing re filing receipts and final discharge for **11/23/09**.

(kra)

FUTURE HEARING DATES: 4/20/09 Hearing re Final Discharge of PG

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH **PROBATE**

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700209

CASE NAME: MTR OF MARY ELLEN MARTINEZ

HEARING:  
Accounting Review

COUNSEL:  
MARGARET LILLIAN APODACA (PET)...JAY OBERHOLTZER  
ALICE MARY RAYGOZA (PET)...JAY OBERHOLTZER  
MARY ELLEN MARTINEZ (DEC)...  
DEPT OF HEALTH CARE SERVICES (TP )...

GENERAL INFORMATION

**Continued from 7/14/08 and 9/11/08 at request of counsel.**

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 7/20/07, \$20,000 bond.
2. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.  
Clerk to notice bonding company.

(kra/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700257

CASE NAME: HAROLD R. NELSON

HEARING:

FIRST AND FINAL Account and Report of MARK DENNY and Petition for fees

COUNSEL:

MARK DENNY (PET)...ROBERT R BOWNE  
HAROLD R NELSON (DEC)...  
DEPARTMENT OF HEALTH CARE SERV(TP )...PRO/PER

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Waiver of Account and Petition for Fees and Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner alleges all residuary beneficiaries waive an accounting. However, need waiver of account from Louis Elroy Nelsen.
2. Petitioner proposes distribution in accord with an Agreement Distribution. However, the attached agreement is only signed by Mark Kenny, individually and as personal representative. Need signatures of all heirs or in the alternative need a corrected proposed distribution per intestate succession.
3. Statutory fees are \$7,322.00 ok
4. Petitioner requests reimbursement of \$22,261.20 for cost advanced in the administration of the estate. Repot indicates these cost were accrued as repairs, clean-up and improvements to the real property. Itemized.
5. Attorney requests extraordinary fees of \$2,667.50, but has agreed to accept a reduced rate of \$2,000.00. Billing is based on a rate of \$275/hour for 9.6 hours. Itemized.
6. Petitioner requests to withhold \$3,500 for closing expenses.

RECOMMENDATION:

Need to clear note 2. If approved, court to set hearing re filing receipts and final discharge for **11/23/09**.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700475

CASE NAME: LEATHY R. FOREHAND

HEARING:  
Accounting Review

COUNSEL:  
BETTY J STEPHENS (PET)...PRO/PER  
LEATHY R FOREHAND (DEC)...

GENERAL INFORMATION:

**Continued from 9/8/08 at request of petitioner as property is not sold.**

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 7/2/07, no bond.
2. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700523

CASE NAME: MTR OF RICHARD E ROBERTS

HEARING:

Hearing Re: Order for first and final to be submitted

COUNSEL:

KELLY K REYNOLDS	(PET)...PRO/PER
RICHARD E ROBERTS	(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Submission of Order for first & final account

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Matter set at the time set for hearing re 1st & final account and petition for final distribution on 9/15/08
2. No order submitted for approval.

RECOMMENDATION:

Inquire status.

FUTURE HEARING DATES:

9/17/09 Hearing re Final Discharge

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700543

CASE NAME: MTR OF NONA LOUISE WRIGHT

**SEE ALSO 7**

HEARING:

Order to Show Cause re: Failure to Appear/File an Accounting  
filed by EDIE EVERAGE.

COUNSEL:

EDIE EVERAGE (PET)...ERIC LEE NIEMEYER  
NONA LOUISE WRIGHT (DEC)...

GENERAL INFORMATION:

**On 9/22/08 Court set this OSC hearing as there was no appearance or accounting  
filed. Clerk mailed notice to counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON OSC re Failure to Appear or File an Accounting

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 7/17/07, no bond required.
2. Waiver of account filed.

RECOMMENDATION:

See notes on following page.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR  
HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700543

CASE NAME: MTR OF NONA LOUISE WRIGHT

**SEE ALSO 6**

HEARING:

Waiver of account and for final distribution.

COUNSEL:

EDIE EVERAGE (PET)...ERIC LEE NIEMEYER  
NONA LOUISE WRIGHT (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Waiver of Account and Petition for Fees and Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner alleges all heirs waive accounting. However, the attached document referenced is a waiver of bond and not a waiver of account. Need a waiver of account from all heirs. Alternatively, need an accounting.
2. Report does not contain the required statements as to: (1) Creditors' claims; (2) Sales, purchases, or exchanges of assets; (3) Changes in the form of assets; (4) Assets on hand; (5) Whether the estate is solvent; (6) Detailed schedules of receipts and gains or losses on sale (where an amount other than the amount of the Inventory and Appraisal is used as a basis for calculating fees or commissions); (7) Costs of administration (if reimbursement of these costs is requested); (8) The amount of any fees or commissions paid or to be paid; (9) The calculation of such fees or commissions as described in rule 7.705; and (10) For decedent's estate proceedings commenced on or after August 18, 2003, the information required by rule 7.552(a) and (b) per CRC 7.550. Need verified supplement.
3. Report does not contain the required statements as to compliance under Pr.C.§1064. Need verified supplement.
4. Need proposed distribution.

RECOMMENDATION:

Need a final report and distribution.

(kra)



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700743

CASE NAME: LILLIAN WHANG

**SEE ALSO 9**  
**COMPANION FILE= GARRS700070.**

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
GRACE H BLACKMON (PET)...DIANE E ROBBINS  
LILLIAN WHANG (DEC)...  
DOUG ANDERSON (TP )...GREGORY T ANNIGIAN

GENERAL INFORMATION:  
Continued from **5/12/08** and **7/7/08** at request of counsel. Nothing new filed.  
**Continued from 8/25/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of administration issued 9/10/07, \$510,000 bond.
2. No inventory filed. Need final I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.  
(kra/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700743

CASE NAME: LILLIAN WHANG

**SEE ALSO 8**  
**COMPANION FILE= GARRS700070.**

HEARING:  
Accounting Review

COUNSEL:  
GRACE H BLACKMON (PET)...DIANE E ROBBINS  
LILLIAN WHANG (DEC)...  
DOUG ANDERSON (TP )...GREGORY T ANNIGIAN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 9/10/07, \$510,000 bond.
2. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

Clerk to notice bonding company.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0700749

CASE NAME: DONALD W. PAGE

HEARING:  
Accounting Review

	COUNSEL:
MARK SMITH	(PET)...CASEY & RICHARDS
KARL HOYER	(PET)...CASEY & RICHARDS
DONALD W PAGE	(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 9/12/07, no bond.
2. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0701051

CASE NAME: ROSARIO MARIA DOMINGUEZ

**SEE ALSO 12 & 13**

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

GLORIA CLINGERMAN (PET)...JEFFREY C SQUIRE  
ROSARIO MARIA DOMINGUEZ (DEC)...  
MARIO DOMINGUEZ (RES)...ROGER E WALKER

GENERAL INFORMATION:

**Continued from 8/20/08 and 10/6/08 at request of counsel.**

THIS CASE IS SET FOR HEARING ON

Hearing re I&A.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Probate petition granted 1/30/08, \$20,000 bond.
2. Partial 1 Inventory and Appraisal filed. Need final Inventory and Appraisal.

RECOMMENDATION

Inquire status. When an inventory and appraisal is not filed as ordered, the court may set hearing in accord with Pr. C. §§ 8804 and/or 8505.

(Abs/cbr/kra)

FUTURE HEARING DATES:

4/08/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0701051

CASE NAME: ROSARIO MARIA DOMINGUEZ

**SEE ALSO 11 & 13**

HEARING:

OSC re: Dismissal of 850 petition due to lack of service

COUNSEL:

GLORIA CLINGERMAN (PET)...JEFFREY C SQUIRE

ROSARIO MARIA DOMINGUEZ (DEC)...

MARIO DOMINGUEZ (RES)...ROGER E WALKER

GENERAL INFORMATION:

Continued from **8/20/08** Attorney Walker and Dominick request that the petition be dismissed due to lack of service and length of time since the petition was filed. Court will continue matter for counsel to serve the remaining parties. Nothing new filed.

**Continued from 10/6/08 as attorney Walker states that a withdrawal of the 850 petition has or is to be filed by attorney Squire. Also, counsel is in the process of withdrawing the lis pendens on the property.**

THIS CASE IS SET FOR HEARING ON

OSC re dismissal of Pr.C. 850 petition filed on 12/18/07

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. At 6/25/08 continued hearing on Pr.C. 850 petition, counsel for Rosemary Dominguez appeared and stated that his client had not been personally served with this petition filed in 12/07. Counsel also stated there was a third party (named on deed) who had not received service. Counsel also stated that clarification of properties is needed. Court set this OSC re dismissal.
2. See 6/25/08 probate notes in court file (tabbed) re underlying petition and case background.
3. A new proof of service was filed 7/21/08 (after prior hearing). However, only service by mail is indicated. As has been noted in prior probate notes, per Pr.C. 851 personal service is required by persons who possess or claim an interest in

the subject property (e.g., Rosemary Dominguez). All 16 Parties served by mail had returned an acknowledgement of receipt with exception of 6 parties. Of the six acknowledgements not returned, Mario Dominguez and Susan Augustine were served via substituted service. The remaining four, Rosemary Dominguez, Rosalinda Dominguez, Michael Dominguez and Rachel Alfario have due diligence declarations filed. Tabbed. (see next note) Judge to decide if sufficient.

4. Ex-Parte order for publication of summons to be heard with this matter.
5. Notices of acknowledgement of Receipt filed for Jesse and Darla Dominguez. Suggest court review (tabbed).
6. **Notice of withdrawal of lis pendens filed.**

#### RECOMMENDATION

Court's discretion.

(Abs/cbr/kra)

#### FUTURE HEARING DATES:

4/08/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0701051

CASE NAME: ROSARIO MARIA DOMINGUEZ

**SEE ALSO 11 & 12**

HEARING:

Ex parte hearing re: APPLICATION FOR ORDER FOR PUBLICATION

COUNSEL:

GLORIA CLINGERMAN (PET)...JEFFREY C SQUIRE  
ROSARIO MARIA DOMINGUEZ (DEC)...  
MARIO DOMINGUEZ (RES)...ROGER E WALKER

**Ex-parte hearing – No notes- This hearing was originally set as an ex parte hearing and was continued from 08/13/08 and 8/20/08 and 10/6/08.**

FUTURE HEARING DATES:

4/08/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800120

CASE NAME: STEVEN J. STAGE

HEARING:

Petition for TO DETERMINE OWNERSHIP OF ESTATE PROPERTY, FOR  
ORDER AUTHORIZING, ETC

COUNSEL:

STEVEN MICHAEL STAGE (PET)...HORSPOOL & PARKER  
STEVEN J STAGE (DEC)...  
CHARLES R STAGE (PET)...PRO/PER

GENERAL INFORMATION:

**Continued from 9/29/08 for Craig parker to file written objections.**

THIS CASE IS SET FOR HEARING ON Petition to Determine Ownership of Estate  
Property and Directing Representative to Transfer Estate Property to Petitioner

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner, Charles Stage, alleges that the personal representative has possession of certain personal property assets in the decedent's estate with a fair market value of \$2,000. Thos items consist of a red tool box, red tool cabinet, air tools, lever hoist and a stock sportster gas tank. Petitioner contends that all of the personal property items belongs to petitioner. Petitioner also alleges he has advanced funds for costs totaling \$666.00. Itemized.

RECOMMENDATION:

Need determination if any response/opposition will be filed and then court's discretion.  
(gls/kra)

FUTURE HEARING DATES:

1/12/09 Hearing re: Inventory and appraisal  
8/17/09 Accounting Review



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800157

CASE NAME: ANTIONETTE HANSON

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

QUEEN E. HANSON (PET)...PRO/PER  
ANTIONETTE HANSON (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 4/28/08, no bond.
2. No inventory filed. Need final I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.  
(kra).

FUTURE HEARING DATES:

6/22/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800175

CASE NAME: RAYMOND EDWIN GRANT

***VACATED- FINAL I&A FILED.***

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
ROBERT M. GRANT (PET)...THOMAS W SARDONI  
RAYMOND EDWIN GRANT (DEC)...  
DEPARTMENT OF HEALTH CARE SERV(TP )...

FUTURE HEARING DATES:  
6/22/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800179

CASE NAME: DAVID RICHARD BAHR

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
LAURA L BAHR (PET)...HARTNELL, LISTER & MOORE  
DAVID RICHARD BAHR (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 4/14/08, no bond.
2. Partial No.1 inventory filed. Need final I&A.

RECOMMENDATION:  
Inquire status.  
(kra).

FUTURE HEARING DATES:  
6/22/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800493

CASE NAME: THE RIDER FAMILY REVOCABLE TRUST

HEARING:  
Hearing Re: Removal and Surcharge (accounting)

COUNSEL:  
JANET FLOWERS (PET)...GRESHAM SAVAGE NOLAN & TILDEN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting by trustees

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Matter set at the time set for hearing re petition to compel trustees to account and petition to remove trustees on 8/11/08. Court granted the petition and set this hearing.
2. No accounting filed

RECOMMENDATION:  
Inquire status  
(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800911

CASE NAME: JUAN ALARCON

HEARING:

Hearing re: Petition for Letters of Admin. W/ Limited Authority under IAEA

	COUNSEL:
SANDRA CEDILLO	(PET)...D'BRAUNSTEIN LAW GROUP
JUAN ALARCON	(DEC)...

**PROPS0800915 HAS BEEN CONSOLIDATED INTO PROPS0800911. PROPS0800911  
IS DEEMED AS THE MASTER FILE.**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800913

CASE NAME: MARY R. BACA

HEARING:  
Petition to determine succession to Real Property

COUNSEL:

MARVIN C. BACA	(PET)...AMY YORK GARRETT
SUSAN L. MARTINEZ	(PET)...AMY YORK GARRETT
SAMANTHA M. RITCHEY	(PET)...AMY YORK GARRETT
JOANNA L. CARDOZA	(PET)...AMY YORK GARRETT
MARY R. BACA	(DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON petition to determine succession (estate  
\$100,000 or less)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioners are decedent's children and request a determination of real property located in San Bernardino, CA to pass to petitioners equally through decedent's will.
2. Appears procedurally complete.

RECOMMENDATION:  
Court's discretion.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: PROPS0800915

CASE NAME: JUAN LUQUE ALARCON

***VACATED- CASE CONSOLIDATED INTO THE MASTER FILE PROPS0800911.  
HEARING RESET IN THE MASTER FILE.***

HEARING:

Hearing re: Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

MERCEDES SOTO ALARCON (PET)...AMY YORK GARRETT  
JUAN LUQUE ALARCON (DEC)...

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS06063

CASE NAME: MTR OF ANNE H PRILL

HEARING:

Hearing Re: Status Report on Account

COUNSEL:

STEVEN T PRILL (PET)...PRO/PER  
ANNE H PRILL (DEC)...  
PAMELA COLEMAN (PET)...MARTIN E KELLER  
PEGGY ROSE SZYCHOWSKI (TP )...MARTIN E KELLER

GENERAL INFORMATION

Continued from **5/19/06, 8/18/06, 11/6/06, 12-14-06 & 1-17-07** at request of counsel to clear probate notes and for written objections to be filed. Nothing new filed.

Continued from **2/28/07** at request of counsel to file verified supplements.

Continued from **4/25/07** at request of counsel. Nothing new file.

Continued from **6/27/07**. second supplement to be filed. Offer received on property.

Counsel to submit new Letters for Pamela Coleman since Steven Prill has resigned.

Continued from **8/1/07** at request of counsel to address objections filed.

Continued from **9/6/07, 10/25/07, 12/13/07, 2/28/08 and 4/10/08** at request of counsel-possible objections by the heirs.

Continued from 6/24/08 at request of counsel. Oral report given by Martin Keller. Nothing new filed.

Continued from **8/4/08** as counsel states he is working on a resolution to close the estate. A family member may be purchasing the home. Nothing new filed.

**Continued from 9/29/08 as Counsel states that the probate notes were addressed in a second supplement and that a notice of proposed action was filed as an heir is trying to purchase the property.**

THIS CASE IS SET FOR HEARING ON Probate status report.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Letters testamentary issued **12/14/04** to co-executors petitioner and Steven Prill. Mr. Prill filed resignation 4/6/06.



2. Petitioner requests unspecified period to continue to administer trust. File a verified supplement indicating what additional time is needed and what remains to be done. **Supp: anticipated time of completion/close of the estate is March 2008.**
3. In the accounting please file verified supplements explaining the following:
  - a. Monthly payments to Acorn Bookkeeping with billings from \$85 to \$309. It appears that monthly check writing involved only 2-10 checks. Why was it necessary to retain a bookkeeping company? **Supp: prior to death decedent had difficulties and monies were placed in trust with Acorn Bookkeeping to assist in bill paying.**
  - b. Who is Chris Loper and why was he paid \$230 on 5-3-04. **Supp: airfare for son of decedent to attend decedent's funeral. Petitioner alleges that none of the heirs objected to this payment.**
  - c. Who is Edward Ingraham and why was he paid \$400 on 3-29-05. **Supp: for preparing an appraisal of the real property. As a payment of \$412.10 was paid to B.M. Garvin on 4/1/05 for probate appraisal, question why a separate appraisal was necessary. Need verified supplement.**
  - d. File a bank statement supporting the assets on hand. Local Rules of Court, Rule 20-908. **Not addressed in the 2<sup>nd</sup> supplement.**
4. No objections are filed at the time of the review of this file.
5. **Notice of proposed action filed.**

#### RECOMMENDATION

Need to clear notes 3c & 3d.

(/gls/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS06683

CASE NAME: EST OF HELEN L ISGRIG

**SEE ALSO 24**

HEARING:

Petition for DETERMINE INTEREST IN ESTATE

COUNSEL:

STEVEN W MANN (PET)...GUAY P WILSON  
HELEN L ISGRIG (DEC)...

GENERAL INFORMATION

On 1/27/06 court admitted decedent's will and Letters were issued.

On 6/20/06 court admitted codicil to the will.

Continued from **12/4/06** and **1/25/07** and **6/4/07** at request of counsel. Nothing new filed.

Continued from **7/23/07** at request of counsel. Nothing new filed.

Continued from **9/24/07** for Attorney Arnold to be present. Nothing new filed.

**Continued from 11/19/07, 3/17/08, 5/12/08, 6/23/08 and 8/11/08 at request of counsel.  
Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Petition to determine interest in estate

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner requests court determination re interest in personal property bequeathed in the codicil.
2. Need P&As re what language in the codicil is being disputed or the specific bequeath that is being disputed. (Issue appears to be that the will left all household furnishings, personal effects, etc. to one person yet codicil allowed neighbor to select certain items – parties cannot agree which items can be taken by neighbor. Issue needs to be framed more specifically if court is to make any determination, such as the specific language in the codicil at issue, the property available and in dispute, etc.).

RECOMMENDATION: Need to clear notes.

(/kra).

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR  
HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS06683

CASE NAME: EST OF HELEN L ISGRIG  
**SEE ALSO 23**

HEARING:  
SECOND AND FINAL Account and Report of STEVEN W MANN and Petition for fees

COUNSEL:  
STEVEN W MANN (PET)...GUAY P WILSON  
HELEN L ISGRIG (DEC)...

GENERAL INFORMATION:  
**Continued from 5/12/08, 6/23/08, and 8/11/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON 2<sup>nd</sup> & final account and petition for fees and final distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Graduated filing fee schedule filed showing a corrected filing fee of \$110 is due. However, no further filing fee is due.
2. Petitioner and attorney request statutory fees of \$16,419.00 less \$13,000 which was approved by the court and paid leaving a balance of \$3,419.00 requested.
3. Need copies of bank statements verifying balance of property on hand per local rule 20-908. Statements provided. However, balance differs from balance on hand given in the petition. Need verified supplement reconciling discrepancy.
4. Estimated schedule of distribution (exhibit c) indicates a specific gift to petitioner in the amount of \$18,000.00. Question the authority of these distributions. Supplement indicates the \$18,000 gifts of personal property to the petitioner have yet to be made or approved by the Court. JTD
5. Petitioner alleges the estate is now in a condition to be closed. However, the distribution of the personal property has yet to be resolved. (See prior page).
6. Need Notice of Hearing with proof of service.

RECOMMENDATION: Need to clear note 3 and notice.  
(kra/cbr/vet/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS06801

CASE NAME: EST OF ROSA L BLACKWELL

HEARING:  
Accounting Review

COUNSEL:

PATRICIA BLACKWELL	(PET)...	MARTIN E KELLER
ROSA L BLACKWELL	(DEC)...	
HENRY BLACKWELL	(TP )...	HORSPOOL & PARKER

GENERAL INFORMATION

Continued from **4/5/07, 6/21/07, 8/2/07, 10/11/07 and 12/6/07** at request of counsel to clear notes. Nothing new filed.

Continued from **2/21/08** at request of counsel to finish preparing accounting. Court states there will be no more continuances. Nothing new filed.

Continued from **4/14/08** at request of counsel. Counsel states that they are waiting for withdrawal of creditor claims. Nothing new filed.

**Continued from 5/19/08, 7/7/08 and 9/29/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters of Administration issued 2/3/06, no bond.
2. No Accounting and/or status report is filed.

RECOMMENDATION:

When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq. There is no bonding company to notice.  
(/gls/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS06817

CASE NAME: EST OF SALVADORE A LUCAS

HEARING:  
Accounting Review

COUNSEL:

FRANK G S LUCAS	(PET)...	BRYAN C. HARTNELL
SALVADORE A LUCAS	(DEC)...	
ARTURO ALEMANY	(PET)...	BRYAN C. HARTNELL
ALEXANDER A ALEMANY	(SA )...	HARTNELL LISTER & MOORE

GENERAL INFORMATION:

**Continued from 7/28/08 and 9/29/08 at request of counsel.**

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued to Arturo Alemany on 1/26/07. On 7/23/07 Court approves accounting and finds estate is not in a condition to be closed and set this hearing date. On 3/11/08 Court appoints successor, Alexander Alemany as Arturo Alemany resigned as personal representative.
2. No accounting or status report of administration filed. Need final account by Arturo Alemany.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.  
(kra)

FUTURE HEARING DATES:

6/29/09 Accounting Review of accounting by Successor Alexander Alemany.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS06843

CASE NAME: EST OF WILLIAM JUNIOR FLANAGAN

**SEE ALSO COMPANION FILE SPRSS07190 E1 PAGE 32.**

HEARING:

FIRST Account and Report of DONALD FLANAGAN and Petition for fees

COUNSEL:

DONALD FLANAGAN	(PET)...	ROBBINS & HOLDAWAY
WILLIAM JUNIOR FLANAGAN	(DEC)...	
DAVID E FLANAGAN	(PET)...	PHILLIP C LEMMONS
BILLY CAROLE FELCHER	(PET)...	E LAWRENCE BROCK
DONALD FLANAGAN	(PET)...	DIANE E ROBBINS
HEIR BUYOUT COMPANY	(TP )...	PRO/PER
TED R HENDRICKSON	(TED R HENDRICKSON	)...TED R HEN

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON 1<sup>st</sup> account current

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner alleges the estate is not in a condition to be closed as the estate property has not been sold. The estate has 5 properties that remain unsold here in California and in the state of Nevada.
2. The accounting period covers 2/10/06 – 5/31/08.
3. No fees are requested.
4. Notice of hearing filed. However, need proof of service on Heir Buyout Co. and Jamie Flanagan.

RECOMMENDATION:

Need notice. If approved, court to set hearing re accounting for **11/23/09**.  
(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS06994

CASE NAME: ESTATE OF DOUGLAS JOHN MC BRIDE

HEARING:

Petition for FOR ORDER COMPELLING AN ACCOUNTING, TO SHOW CAUSE  
WHY ESTATE CANNOT BE CLOSED ETC

COUNSEL:

LAURA MC BRIDE	(PET)...	WILLIAM M NASSAR & ASSOCIATES
DOUGLAS JOHN MC BRIDE	(DEC)...	
UNIVERSAL FOREST PRODUCTS, INC	(PET)...	HORSPPOOL & PARKER
KATHE ANNE MCBRIDE	(PET)...	SNYDER & HANCOCK
JEAN HERTEL	(TP )...	SNYDER & HANCOCK
KATHE ANNE MCBRIDE	(SNYDER & HANCOCK	)...SNYDER &
KENDRA MCBRIDE-ZIZZAMIA	(SNYDER & HANCOCK	)...SNYDER &
ALBERT REALE	(SNYDER & HANCOCK	)...SNYDER &
THOMAS REALE	(SNYDER & HANCOCK	)...SNYDER &
KIM EAST WESTPHAL	(SNYDER & HANCOCK	)...SNYDER &
JANET C JOHNSON	(SNYDER & HANCOCK	)...SNYDER &
JAMES H WEBB	(SNYDER & HANCOCK	)...SNYDER &
KERRY MCBRIDE	(SNYDER & HANCOCK	)...SNYDER &

GENERAL INFORMATION:

Letters of Administration issued 6/7/06 (full authority, \$20,000 bond)

THIS CASE IS SET FOR HEARING ON Petition to compel an accounting

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner is an heir of the estate and alleges the estate is in a condition to be closed. Though petitioner does not make a prayer in this pleading, it appears petitioner requests the court require the administrator to file a final accounting and petition for distribution.
2. On 1/24/08 matter came on for a Status report of Administration. The administrator stated that the estate could not be closed until it is determined whether the decedent had a 401k plan and death benefits payable to the estate.

The Court granted an extension and continued the accounting review hearing to 1/9/09.

3. Submit order after hearing.

**RECOMMENDATION:**

Court's discretion.

(kra)

**FUTURE HEARING DATES:**

1/09/09 Accounting Review



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07030

CASE NAME: EST OF RACHEL C ROMO

**SEE ALSO 30 & 30A & 31**

HEARING:

Hearing Re: REPORT OF STATUS OF ADMINISTRATION

COUNSEL:

LOUIE C ROMO	(PET)...	WILLIAM M NASSAR & ASSOCIATES
RACHEL C ROMO	(DEC)...	
ROSELLA VENEGAS	(PET)...	THOMPSON & COLEGATE
YOLANDA ROBLEDO	(PET)...	THOMPSON & COLEGATE
THOMPSON & COLEGATE	(TP )...	ROBERT B SWORTWOOD

GENERAL INFORMATION:

Continued from 11/15/07 at request of counsel

Continued from 1/10/08 at request of counsel to trail hearing.

Continued from 2/11/08 at request of counsel for discovery

Notice of Ruling entered 2/20/08 concerning the hearings re Petition for damages, Report of status, Petition to establish claim, and Petition to continue operation of business. Counsel advised the Court that Ms. Venegas and Ms. Robledo agreed to withdraw the Petition to continue operation of business and to sell the restaurant properties with proceeds placed in blocked accounts until final conclusion of all matters. Counsel also advises the Court that all parties anticipated conducting discovery on the competing petitions re elder abuse.

**Continued from 8/11/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Report of Status of Administration

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Letters of Administration issued 6/27/06 (full authority, no bond)
2. Petitioner alleges the estate is not in a position to close as the real properties of the estate must be sold. Petitioner put all three real properties into escrow. Petitioner received objections to the sale from the beneficiaries

and, therefore, has begun the process of selling the real properties through court confirmation. The estate lost the sale on one of the properties but is trying to preserve the sale on the other two. Petitioner requests an additional six months to conclude the estate administration.

**RECOMMENDATION:**

If approved, set next accounting review/status report for 5/29/08.

(/gls/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR  
HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07030

CASE NAME: EST OF RACHEL C ROMO  
**SEE ALSO 29 & 30A & 31**

HEARING:

Petition for DAMAGES RE FINANCIAL ELDER ABUSE; CONVERSION; FRAUD

COUNSEL:

LOUIE C ROMO	(PET)...WILLIAM M NASSAR & ASSOCIATES
RACHEL C ROMO	(DEC)...
ROSELLA VENEGAS	(PET)...THOMPSON & COLEGATE
YOLANDA ROBLEDO	(PET)...THOMPSON & COLEGATE
THOMPSON & COLEGATE	(TP )...ROBERT B SWORTWOOD

GENERAL INFORMATION:

Continued from 2/11/08 at request of counsel for discovery.

**Continued from 8/11/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Petition for damages for financial abuse, conversion, and fraud (Pr.C.§850)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner, Louie Romo, administrator of the estate, alleges that decedent prior to death in 2/2004 deeded two properties to Rosella Venegas and the remainder of her properties to petitioner; and that decedent's daughters Rosella and Yolanda, decedent's daughters, misused the resources of decedent's restaurant causing the business to suffer. Petitioner alleges that Rosella and Yolanda through undue influence, fraud and conversion control decedent's ability to manage and operate the restaurant. Petitioner also claims elder abuse against decedent as decedent was 65 or older at the time of these allegations.
2. Petitioner requests judgment for compensatory damages, damages for emotional distress, exemplary damages and attorney fees incurred in this action.
3. No opposition filed at the time of review of this file.

RECOMMENDATION: Court's discretion.  
(kra).

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07030

CASE NAME: EST OF RACHEL C ROMO  
**SEE ALSO 29 & 30 & 31**

HEARING:  
Petition for ESTABLISH ESTATES CLAIM OF OWNERSHIP OF PROP 01/10/08

COUNSEL:  
LOUIE C ROMO (PET)...WILLIAM M NASSAR & ASSOCIATES  
RACHEL C ROMO (DEC)...  
ROSELLA VENEGAS (PET)...THOMPSON & COLEGATE  
YOLANDA ROBLEDO (PET)...THOMPSON & COLEGATE  
THOMPSON & COLEGATE (TP )...ROBERT B SWORTWOOD

GENERAL INFORMATION:  
Continued from **1/10/08** at request of counsel to trail hearing.  
Continued from **2/11/08** at request of counsel for discovery.  
**Continued from 8/11/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Petition to Establish Estate's Claim of Ownership of Property (Pr.C. §850)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioners, Rosella Venegas and Yolanda Robledo, are the children and are intestate heirs of decedent. Petitioners allege that Louie Romo (son of decedent) was added as a joint tenant or tenant-in-common to the deeds of nearly all the real properties in the decedent's estate by undue influence on or about 2/17/04.
2. Need to file notice of hearing and proof of service, including personal service upon Louie Romo per Pr.C. §851. **Proof of mail service filed. However, personal service is required upon Louie Romo. Need proper notice.**
3. **Objection filed by Louie Romo.**

RECOMMENDATION:  
Need notice and then set for Evidentiary hearing.  
(gls/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
-----

CASE #: SPRSS07030

CASE NAME: EST OF RACHEL C ROMO

**SEE ALSO 29 & 30 & 30A**

HEARING:

Petition for AUTHORITY TO CONTINUE OPERATION OF BUSINESS 01/10/08

COUNSEL:

LOUIE C ROMO	(PET)...	WILLIAM M NASSAR & ASSOCIATES
RACHEL C ROMO	(DEC)...	
ROSELLA VENEGAS	(PET)...	THOMPSON & COLEGATE
YOLANDA ROBLEDO	(PET)...	THOMPSON & COLEGATE
THOMPSON & COLEGATE	(TP )...	ROBERT B SWORTWOOD

GENERAL INFORMATION:

Continued from **1/10/08** at request of counsel to trail hearing.

Continued from **2/11/08** at request of counsel for discovery.

**Continued from 8/11/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Petition for Authority to Continue Operation of Decedent's Restaurant Business per Pr.C. § 9760

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioners, Rosella Venegas and Yolanda Robledo, request authority to continue the operation of decedent's business known as Dell's Drive In. Petitioners allege that until 3/16/07, the business was thriving and a profitable asset of the estate. Although the restaurant has been closed for approximately six months, with little effort it could be reopened to again become a thriving asset of the estate. Petitioners allege that it is in the best interest of decedent's estate to continue the operation of the business. Moreover, petitioners are familiar with the business operations and are competent to provide the required continuing management. Also, petitioners request that the business compensation petitioners \$500/week to manage the business. The business has no known creditors. Question if the

proposed salary is \$500 to *each* petitioner or collectively? Also question the cost involve to reopen the business (i.e., does the benefit of reopening the restaurant outweigh the costs)? File verified supplement.

2. Need to file notice of hearing and proof of service.
3. **Objection to petition to continue operation is filed by Louie Romo.**

RECOMMENDATION:

Need to clear notes.

(gls/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07190

CASE NAME: TRUST OF WILLIAM J FLANAGAN ET AL

**SEE ALSO COMPANION FILE SPRSS06843 E1 PAGE 27.**

HEARING:  
Hearing Re: Status

COUNSEL:  
DAVID E FLANAGAN (PET)...PHILLIP C LEMMONS  
BILLY CAROLE FELCHER (PET)...E LAWRENCE BROCK

GENERAL INFORMATION:  
**Continued from 6/23/08 and 9/29/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Status

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Matter set on court's own motion.
2. On 8/13/07 hearing came on for Petition to determine the internal affairs of a trust pursuant to Pr.C. § 17200, ascertaining beneficiaries. Court took matter under submission.
3. A copy of the Statement of decision dated 10/9/07 is placed on the left side of the file.

RECOMMENDATION:  
None.  
(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07265

CASE NAME: EST OF RALPH C KILBORN

**SEE ALSO 33A AND PAGE 48 AT 10:30AM AND ALSO COMPANION FILE  
SCSS03169 E1 PAGE 47**

HEARING:

Petition for DETERMINATION THAT CERTAIN COMMUNITY PROPERTY  
ASSETS HELD

COUNSEL:

RONALD KILBORN	(PET)...JACK B OSBORN
RALPH C KILBORN	(DEC)...
ROBERT C KILBORN	(OBJ)...BRIAN J SIMPSON

No notes – Judge to decide.

Matter stayed per stipulation of parties. See 12/13/07 probate notes in file for background.

Continued from 5/8/08 at request of counsel as parties are close to a settlement.

**Continued from 7/28/08 and 9/29/08 at request of counsel. Nothing new filed.**



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E1  
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CASE #: SPRSS07265

CASE NAME: EST OF RALPH C KILBORN

**SEE ALSO 33 AND PAGE 48 AT 10:30AM AND ALSO COMPANION FILE SCSS03169  
E1 PAGE 47**

HEARING:  
Petition for RELIEF FROM BREACH OF TRUST

COUNSEL:  
RONALD KILBORN (PET)...JACK B OSBORN  
RALPH C KILBORN (DEC)...  
ROBERT C KILBORN (OBJ)...BRIAN J SIMPSON

No notes – Judge to decide.

Matter stayed per stipulation of parties. See 12/13/07 probate notes in file for background.  
**Continued from 7/28/08 and 9/29/08 at request of counsel. Nothing new filed.**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH ***PUBLIC GUARDIAN***

-----  
DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: CONPS0700117

CASE NAME: ILMA FLORENCE LUKATICH

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (PET)...COUNTY COUNSEL - SAN BERNARD  
ILMA FLORENCE LUKATICH (CEE)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Per Minute Order 02-04-08, conservatee died on 12-11-07.
- 2 1<sup>st</sup> and **Final** Accounting now due covering the period 06-14-07 to 06-13-08.
- 3 No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(vet)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: CONPS0700127

CASE NAME: MTR OF MARIANO MENDOZA

***VACATED- ACCOUNTING FILED AND IS SET FOR 11/24/08.***

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
MARIANO MENDOZA (CEP)...HARTNELL LISTER & MOORE

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: CONPS0800010

CASE NAME: SARAH LEE RUBEN

HEARING:  
Accounting Review

	COUNSEL:
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
SARAH LEE RUBEN	(CEP)...HARTNELL LISTER & MOORE

GENERAL INFORMATION  
Letters expire 02-22-09.

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 On 08-15-08 court granted the Petition for rehearing and termination of the conservatorship.
- 2 1<sup>st</sup> and **final** accounting now due covering the period 01-08-08 to 08-15-08.
- 3 No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.  
(vet)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: RC RS00283

CASE NAME: NANCY M HAZEN

HEARING:  
Accounting Review

COUNSEL:  
NANCY M HAZEN (PCE)...  
PUBLIC GUARDIAN (SC)...COUNTY COUNSEL - SAN BERNARDI

GENERAL INFORMATION:

**Continued from 08-18-08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 6/25/07 court approved the 4<sup>th</sup> account; 5<sup>th</sup> accounting now due covering the period 1/31/07 – 01/30/08
2. No accounting filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(cbr/kra/vet)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

-----  
DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SC SS02387

CASE NAME: MTR OF JAQUELINE E. THOMAS

**SEE ALSO 39**

HEARING:  
Conservatorship Compliance Review

COUNSEL:  
GARY N. COTE (CPE)...J.L.WELCH & ASSOCIATES  
JAQUELINE E. THOMAS (CEP)...ROGER E WALKER  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON Compliance Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Final Inventory & Appraisal filed.
- 2 Care Plan filed.
- 3 Court Investigator's Report filed.

RECOMMENDATION:

Court's discretion.

(vet)

FUTURE HEARING DATES: 6/22/09 Accounting Review re Permanent Conservatorship

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SC SS02387

CASE NAME: MTR OF JAQUELINE E. THOMAS

**SEE ALSO 38**

HEARING:  
Accounting Review

COUNSEL:  
GARY N. COTE (CPE)...J.L.WELCH & ASSOCIATES  
JAQUELINE E. THOMAS (CEP)...ROGER E WALKER  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

GENERAL INFORMATION

Order Settling 2<sup>nd</sup> and Final Account by prior conservator, approved 11-26-07.

THIS CASE IS SET FOR HEARING ON accounting review (temporary conservatorship by PG).

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Hearing set on 04-07-08 when matter came on for Petition for Appointment of Conservator by PG. PG was appointed temporary, successor Conservator on 09-27-07 following the resignation of prior conservator.
- 2 No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(vet)

FUTURE HEARING DATES: 6/22/09 Accounting Review re Permanent Conservatorship

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SLCSS01445

CASE NAME: MATTER OF LAURELYNN KIRBY

HEARING:

FOURTH Account and Report of PUBLIC GUARDIAN and Petition for fees

COUNSEL:

PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
LAURELYNN KIRBY	(CEP)...HARTNELL HORSPPOOL & FOX

GENERAL INFORMATION

Letters expire 02-28-09.

THIS CASE IS SET FOR HEARING ON 4<sup>th</sup> account current and petition for fees.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 Accounting period covers 06-08-06 to 04-02-08 (22 months).
- 2 Assets on hand \$463.61 consisting of cash.
- 3 Public Guardian and County Counsel request fees of \$116.00 each.

RECOMMENDATION:

If approved, Court to set next **LPS** hearing re Accounting Review for **11-23-09**. Accounting to cover the period of 04-03-08 to 04-02-09. Any accounting to be filed 30 days in advance.

(vet)



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SLCSS01642

CASE NAME: MTR OF FRANCISCO BARBA-VASQUEZ

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
FRANCISCO BARBA-VASQUEZ (CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 On 09-08-08, the 7<sup>th</sup> account current was granted. On 08-04-08, the LPS conservatorship was terminated. Need **final** accounting to cover the accounting period 04-29-08 to 08-04-08.
- 2 No accounting filed.

RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

(vet)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SLCSS02203

CASE NAME: MTR OF LAWRENCE SMITH

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
LAWRENCE SMITH (CEP)...HARTNELL HORSPPOOL & FOX

#### GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

#### THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

- 1 On 01-14-08, the first account current was granted. On 08-15-08, the LPS conservatorship was terminated. Need 2<sup>nd</sup> and **final** accounting to cover the accounting period 06-27-07 to 06-26-08.
- 2 No accounting filed.

#### RECOMMENDATION:

Inquire status. When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SLCSS02616

CASE NAME: MTR OF SANDRA MC KINLEY

HEARING:  
Accounting Review

COUNSEL:  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL  
SANDRA MC KINLEY (CEP)...HARTNELL HORSPOOL & FOX

GENERAL INFORMATION:

Continued from **2/28/08** at request of counsel. Nothing new filed.

**Continued from 08-18-08 at the request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Accounting Review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. The file indicates that conservatee died 9/25/07 and receipts from the Public Administrator have been filed. However, no final accounting has been filed.
2. Second and Final Account is due for the period: 12/19/06 – 12/18/07.
3. No accounting is filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2.  
(gls/kra/vet)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SLCSS02698

CASE NAME: MTR RE ALICE GUERRERO

HEARING:  
Accounting Review

	COUNSEL:
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL
ALICE GUERRERO	(CEP)...

No file available for review.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SLCSS6650

CASE NAME: IN THE MATTER OF JOHN CARL MCHUGH

HEARING:  
Hearing re Final Discharge

	COUNSEL:
JOHN MCHUGH	(CEP)...HARTNELL HORSPPOOL & FOX
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

**A-O**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SLCSS2228

CASE NAME: IN THE MATTER OF ANGELO MENDOZA

HEARING:  
Hearing re Final Discharge

	COUNSEL:
ANGELO MENDOZA	(CEP)...HARTNELL HORSPOOL & FOX
PUBLIC GUARDIAN	(CPE)...COUNTY COUNSEL

**A-O**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:00 DEPT: E1  
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CASE #: SLCSS6461

CASE NAME: IN THE MATTER OF CAROL ANN GEORGE

HEARING:

SECOND & FINAL Account and Report of PUBLIC GUARDIAN and Petition for fees

COUNSEL:

CAROL ANN GEORGE (CEP)...HARTNELL HORSPOOL & FOX  
PUBLIC GUARDIAN (CPE)...COUNTY COUNSEL

**A-O**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

**CONSERVATORSHIP**

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DATE: 11/17/08 TIME: 10:30 DEPT: E1  
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CASE #: SC SS02895

CASE NAME: MATTER OF BETTY ESTEY

HEARING:  
Accounting Review

COUNSEL:  
DEEANN HARMON (CPE)...SKORETZ & CHURCH  
BETTY ESTEY (CEP)...

GENERAL INFORMATION

Continued from 06-09-08 at request of counsel; awaiting facility statements. Nothing new filed.

**Continued from 9/22/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Matter set at the time set for hearing re termination of conservatorship on 4/14/08. The court ordered Deeann Harmon to file a final accounting for the period 3/17/07 – 4/14/08.
2. No accounting filed.

RECOMMENDATION:

When an accounting is not filed as required, the court shall take action as specified in Pr.C. § 2620.2. Clerk to notice bonding company.  
(kra/vet)



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:30 DEPT: E1  
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CASE #: SC SS03167

CASE NAME: MTR OF CHRISTINE TERKELSEN

HEARING:  
Petition for FOR ATTORNEY'S FEES

COUNSEL:  
TERRY N TERKELSEN (CPE)...EDWARD B FISCHER  
CHRISTINE TERKELSEN (CEP)...KARIN HORSPOOL

GENERAL INFORMATION:  
**Continued from 9/29/08 at request of counsel.**

THIS CASE IS SET FOR HEARING ON Attorney fees for court appointed counsel

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner was appointed 9/25/06 to represent the conservatee. Petitioner requests fees of \$4,560.00 for legal services as relating to conservatee's placement, prepared report to Court as to petition for medical powers, review of accounting and appearances. Itemized. Billing is based on a rate for attorneys at \$225-\$275/hour for a total of 19.4 hours.

RECOMMENDATION:  
Court's discretion.  
(kra/cbr)

FUTURE HEARING DATES:  
7/16/09 Hearing Re: Status on conservatorship of the person

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:30 DEPT: E1  
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CASE #: SC SS03169

CASE NAME: MTR OF PATRICIA ANN KILBORN

***VACATED- ACCOUNTING FILED AND IS SET ON 12/04/08.***

***SEE ALSO COMPANION FILE SPRSS07265 E1 PAGE 48 AND ALSO PAGES 33 & 33A AT 9:00AM.***

HEARING:  
Accounting Review

COUNSEL:

RONALD KILBORN	(CPE)...HARTNELL, LISTER & MOORE
PATRICIA ANN KILBORN	(CTE)...JAMES B CHURCH
JOHN CALLAHAN	(CPE)...BRIAN W. SMETHURST
LAWRENCE A DEAN II	(PCR)...
ROBERT C KILBORN	(OBJ)...BRIAN J SIMPSON

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:30 DEPT: E1  
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CASE #: SPRSS07265

CASE NAME: EST OF RALPH C KILBORN

***SEE ALSO 33 & 33A AT 9:00AM AND ALSO COMPANION FILE SCSS03169 E1 PAGE 47***

HEARING:

Hearing Re: PETITION FOR ENFORCEMENT OF THE IN TERROREM CLAUSE

COUNSEL:

RONALD KILBORN	(PET)...	JACK B OSBORN
RALPH C KILBORN	(DEC)...	
ROBERT C KILBORN	(OBJ)...	BRIAN J SIMPSON

No notes – Judge to decide.

Matter stayed per stipulation of parties. See 12/13/07 probate notes in file for background.

**Continued from 7/28/08 and 9/29/08 at request of counsel. Nothing new filed.**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

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DATE: 11/17/08 TIME: 10:30 DEPT: E1  
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CASE #: VC VS00465

CASE NAME: MATTER OF TASHA MAY WILLETT

HEARING:  
Petition for Appointment of Conservator

COUNSEL:  
MELODY NICHOLS (CPE)...DAVID W BROWN  
TASHA MAY WILLETT (CEP)...  
BETTY TREMBLE (SC )...PRO/PER

GENERAL INFORMATION

Letters of conservatorship of the person only issued to aunt 5/27/05.

THIS CASE IS SET FOR HEARING ON Petition for Successor Conservator of Limited Conservatorship of person and estate, by mother

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. As there does not appear to be a vacancy in the conservatorship, need a resignation of the present conservator or a petition to remove conservator.
2. Nomination of petitioner by conservatee attached. Nomination indicates conservatee wishes to move to Santa Cruz County to live near petitioner.
3. Petitioner requests no bond, but gives no reason for this request. Need verified supplement listing the estimated value of the estate for determination of bond.
4. No Medical or 2590 powers requested.
5. Petitioner has marked section 5(f) indicating the conservatee is not developmentally disabled, but states in 5(c) that conservatee is a client of IRC and is considered Developmentally delayed. As these statements appear to conflict, Court may wish to inquire.
6. Need Court Investigator report.
7. Need IRC report.
8. Need notice of hearing and proof of service.

RECOMMENDATION:

Court may wish to deny estate powers unless there is some actual need (i.e. property owned by the conservatee other than public benefits). If approved, set hearing for Compliance Review for **6/29/09** for the filing of the following: proof of service of Order with Notification of Conservatee's rights per Pr.C.§1830(c); Care Plan per Pr.C.§2352.5; Inventory & Appraisal, and proof of service of I&A and Instructions for Objection per Pr.C.§2610; recordation of letters if applicable per Pr.C.§2313.

Set hearing re Accounting Review for **1/25/10**. Any accounting to be filed 30 days in advance.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE J MICHAEL WELCH

**MISC.**

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DATE: 11/17/08 TIME: 1:30 DEPT: E1  
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CASE #: SPRSS03421

CASE NAME: MTR OF LEE T. HORNIBROOK TRUST

HEARING:  
Hearing Re: COMPLIANCE

COUNSEL:

VIRGINIA HORNIBROOK (PET)...PRO/PER  
CHRISTINE INEZ HORNIBROOK (APP)...ALEXANDRA S. WARD  
CHRISTINE INEZ HORNIBROOK (TEE)...PACIFIC LEGAL RESEARCH GROUP

GENERAL INFORMATION:

Continued from **10/3/07** Court orders Virginia Hornibrook to comply with previous order and personally appear in court. Order signed for compliance and personal service. Attorney Loughman to have Ms. Hornibrook personally served.

Continued from **10/31/07** and **11/28/07** at request of counsel. Nothing new filed.

**Continued from 1-9-08. At the time of the 1-9 hearing the court confirmed its order of 10-3-07 and orders compliance within 60 days. Nothing new filed.**

**Continued from 4/22/08 and 8/28/08. Parties are present to report on status of compliance with court order of 10/3/07. Christine Hornibrook acknowledges receipt of the 40 cup coffee maker, the silver set, the spoon set minus one spoon, and 2 folding chairs. Attorney Loughman indicates that the scrimshaw carving set was left out of the original order in error and requests that the order be amended to add this item. Attorney Wilson objects. Court allows this item to be added and included in the order of 10/3/07. Counsel to prepare a written order for court's signature. Court orders Virginia Hornibrook to comply with court's order by 6/23/08 and appear on 8/28/08 if order has not been complied with.**

THIS CASE IS SET FOR HEARING ON Compliance

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. On 8/20/07 matter came on for OSC re failure to appear/sanctions. The Court approves petition for declaratory relief instructions and damages and set this hearing.
2. Ms. Hornibrook was personally served on 10/12/07.

3. Status Statement and Declaration of Virginia Hornibrook filed.
4. Response to Status Statement and points & authorities in support of petitioner's affidavit for contempt filed by Christine Hornibrook.

**RECOMMENDATION:**

Court's discretion

(/gls/NMT/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN **PROBATE**

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0700246

CASE NAME: BETTY RUTH MATHIS

**SEE ALSO 2**

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
DAVID WILLIAM MATHIS (PET)...EDWARD B FISCHER  
BETTY RUTH MATHIS (DEC)...

GENERAL INFORMATION

Continued from 3/17/08 at request of counsel. Nothing new filed.  
Continued from 4/21/08 at request of counsel to file a corrected inventory.  
**Continued from 6/16/08 as I&A attachment file in court.**

THIS CASE SET FOR HEARING ON Inventory and Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Inventory and appraisal has been filed.
2. Corrected I&A with supporting bank statements filed. However, the statements indicate several checks paid after death of decedent in the amount of \$3,550.22. Substantial variation between the statement and the balance reflected in the inventory shall be explained (Local Rule 20-908). Need reconciliation.

RECOMMENDATION

Need to clear note 2.  
(cbr/NMT/kra)



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E2  
-----

CASE #: PROPS0700246

CASE NAME: BETTY RUTH MATHIS

**SEE ALSO 1**

HEARING:  
Accounting Review

COUNSEL:  
DAVID WILLIAM MATHIS (PET)...EDWARD B FISCHER  
BETTY RUTH MATHIS (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 9/10/07, no bond.
2. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0700744

CASE NAME: LAWRENCE W MILTON

HEARING:  
Accounting Review

COUNSEL:  
BRIAN SCHAEFER (PET)...DIANE E ROBBINS  
LAWRENCE W MILTON (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON accounting review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Letters issued 9/12/07, \$275,000 bond.
2. No accounting or status report of administration filed.

RECOMMENDATION:

Inquire status. When the personal representative does not file an accounting as required, the court shall take action as specified in Pr.C. §11050 et seq.

Clerk to notice bonding company.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0701008

CASE NAME: MTR OF WILLIE CHARLES WILLIAMS

***VACATED AND RESET ONTO 12/08/08.***

***SEE ALSO 5***

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

SALLIE M ROBERSON	(PET)...	RICHARD F NEVINS
WILLIE CHARLES WILLIAMS	(DEC)...	
LOUTISHA E. MCREYNOLDS	(PET)...	RICHARD F NEVINS
TOMMIE R. ROBINSON	(PET)...	RICHARD F NEVINS
JOHN T. ROBINSON JR	(PET)...	RICHARD F NEVINS

FUTURE HEARING DATES:

12/08/08 Order to Show Cause re: PROOF OF BLOCKED ACCOUNTS

12/08/08 Hearing re: Inventory and appraisal

6/11/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0701008

CASE NAME: MTR OF WILLIE CHARLES WILLIAMS

***VACATED.***

***SEE ALSO 4***

HEARING:

Order to Show Cause re: SANCTIONS filed by SALLIE M ROBERSON.

COUNSEL:

SALLIE M ROBERSON	(PET)...	RICHARD F NEVINS
WILLIE CHARLES WILLIAMS	(DEC)...	
LOUTISHA E. MCREYNOLDS	(PET)...	RICHARD F NEVINS
TOMMIE R. ROBINSON	(PET)...	RICHARD F NEVINS
JOHN T. ROBINSON JR	(PET)...	RICHARD F NEVINS

FUTURE HEARING DATES:

12/08/08 Order to Show Cause re: PROOF OF BLOCKED ACCOUNTS

12/08/08 Hearing re: Inventory and appraisal

6/11/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800162

CASE NAME: WILLIAM CHARLES GREENBURG

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

MIRIAM R. GREENBURG (PET)...ROBERT H. DARROW  
WILLIAM CHARLES GREENBURG (DEC)...

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

3. Letters issued 4/14/08, no bond.
4. Partial No.1 inventory filed. Need final I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.  
(kra).

FUTURE HEARING DATES:

6/22/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800178

CASE NAME: BENT OVE OLSEN

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

KENNETH E MARTIN	(PET)...	MCCLELLAN & WILSON
BENT OVE OLSEN	(DEC)...	
VICKI LYNN SLIGER	(TP )...	LAYNE A BARTHOLOMEW

GENERAL INFORMATION

THIS CASE IS SET FOR HEARING ON inventory & appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

5. Letters issued 4/15/08, \$130,000 bond.
6. No inventory filed. Need final I&A.

RECOMMENDATION:

Inquire status. When an inventory and appraisal is not filed as ordered, court may set a hearing in accord with Pr.C. §8804 and/or 8505.

Clerk to notice bonding company.

(kra).

FUTURE HEARING DATES:

6/22/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800228

CASE NAME: THE JO ANNF CLARK REVOCABLE LIVING TRUST

HEARING:  
Hearing Re: STATUS

COUNSEL:  
SCOTT ALAN CLARK (PET)...THE WELCH LEGAL GROUP  
JEFFREY CLARK (OBJ)...SELTERS & SELTERS

GENERAL INFORMATION:

At court trial on 6/25/08, the parties settled and the terms of settlement cited for the record. Attorney Welch was to prepare order and submit to opposing counsel for approval as to form and content.

**Continued from 10/9/08 as order on settlement has not been approved by opposing counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Status

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need Order on Settlement.

RECOMMENDATION:

Inquire re status.  
(gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800494

CASE NAME: LORAIN MARY RUSSELOS

**SEE ALSO 10**

HEARING:

Hearing re: Petition for Letters of Testamentary With Full Authority Under IAEA..

COUNSEL:

THEODORE JOSEPH GABLIN (PET)...KATHLEEN B ALBREKTSON  
LORAIN MARY RUSSELOS (DEC)...  
ROSALIE RUSSELOS (PET)...CARROLL M LAWSON  
CYNTHIA G KRUSE-LEFFLER (TP )...PRO/PER

GENERAL INFORMATION:

Continued from 07-08-08 due to filing of competing petition.

Continued from 8/14/08. All parties confer off record and Court orders all mail received and bill paying is done by Mr. Theodore Gablin, pending appointment of personal representative. Parties decline the Court's offer of a settlement conference and indicate that they are not ready to set a trial date as discovery has not been completed.

**Continued from 10/16/08 for counsel to clear note re proof of summons.**

THIS CASE IS SET FOR HEARING ON Petition for Probate and for Letters Testamentary with full authority under IAEA, by nephew Theodore J. Goblin, with bond – Petition #1

Competing petition for letters of administration with full IAEA authority filed by daughter, Rosalie Russelos – Petition #2

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

**Petition 1 – Theodore J. Goblin:**

1. Petitioner is the sole beneficiary and has waived bond. However, on page 1, Section C, of the purported Will (tabbed) the specific bequest of the Edward Jones Investment and other investments is incomplete. Furthermore, there is no residual clause. Therefore, there may be a residue that would pass by intestate succession whereby decedent's disinherited daughter could possibly share under Pr.C.



§21111(a)(3). Question whether bond waiver is required from daughter, Rosalie Russelos? Supplement filed. Petitioner asserts that Edward Jones Investment Account XXX-97776-X-X will not go through probate because decedent named petitioner as a payable-on-death beneficiary. Secondly, petitioner indicates that the other two (2) Edward Jones Investment account numbers XXX-14573-X-X and XXX-97605-X-X would be subject to laws of intestacy due to the lack of a residuary clause in the will submitted for probate. Lastly, petitioner asserts that decedent had specifically disinherited her daughter and would not intend for any residue to devolve to her daughter.

2. Petitioner requests court to set bond in light of the two (2) Edward Jones Investment accounts and residue not having a named beneficiary. If bond is required, bond should be fixed at \$108,564.25 per estimated value of the property of the estate given in the petition. Judge to decide.
3. **Contest to Probate of Will filed by Rosalie Russelos (daughter).**
4. **Proof of Service by mail filed. However, need properly served summons per Pr.C. § 8250, as well as proof of mailed service on each heir, devisee, executor and alternate executor (Valerie Dye).**

**Amended Petition 2 – Rosalie Russelos:**

5. Amended petition filed 7/8/08; however, it is unclear what was amended. Need declaration in support of amended petition.
6. Petitioner request bond in the amount of \$108,564.25 based on estimated value of the estate.

**RECOMMENDATION:**

Court will have to address the will contest in the above matter before proceeding with contested hearing re competing petitions for probate. Clear notes, then Court's determination re bond.

(gls/vet/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800494

CASE NAME: LORAIN MARY RUSSELOS

**SEE ALSO 9**

HEARING:

Hearing re: Petition for Letters of Admin. W/ Full Authority under IAEA.

COUNSEL:

THEODORE JOSEPH GABLIN (PET)...KATHLEEN B ALBREKTSON  
LORAIN MARY RUSSELOS (DEC)...  
ROSALIE RUSSELOS (PET)...CARROLL M LAWSON  
CYNTHIA G KRUSE-LEFFLER (TP )...PRO/PER

See notes on prior page (matter #9).

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800556

CASE NAME: COLLEEN LESLIE REILLY-LARSEN

**SEE ALSO 12 & 13**

HEARING:

Motion Re: DEMURRER TO OBJECTION TO PETITION TO ADMINISTER  
ESTATE AND NOTICE OF Filed by Petitioner CARMINE A CANNARELLA

COUNSEL:

CARMINE A CANNARELLA (PET)...FULLERTON LEMANN SCHAEFFER & D  
COLLEEN. LESLIE REILLY-LARSEN (DEC)...  
DIANE REILLY (PET)...VOSS SILVERMAN & BRAYBROOKE

No calendar notes will be prepared. Judge to decide.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800556

CASE NAME: COLLEEN LESLIE REILLY-LARSEN

**SEE ALSO 11 & 13**

HEARING:

Petition for PROBATE OF WILL FOR LETTERS OF ADMIN LIMITED BY  
DIANE REILLY

COUNSEL:

CARMINE A CANNARELLA (PET)...FULLERTON LEMANN SCHAEFFER & D  
COLLEEN. LESLIE REILLY-LARSEN (DEC)...  
DIANE REILLY (PET)...VOSS SILVERMAN & BRAYBROOKE

GENERAL INFORMATION

Letters for Special Administration issued on 07/31/08.

**Continued from 07/21/08 and 8/18/08. Richard Reilly filed objects which were not in the proper form. Court instructed Mr. Reilly to file verified objections and serve them properly by 9/15/08 and this will be the last continuance for that purpose. Court urges Mr. Reilly to seek legal advice.**  
**Continued from 10/9/08 as Mr. Dominick to file demurrer and motion to strike.**

THIS CASE IS SET FOR HEARING ON Petition for Letters Testamentary with Will  
Annexed with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

**Petition 1- Cannarella; friend**

1. The first and second nominated executor has signed a declination to act.
2. Petitioner requests no bond as will waives bond. However, will waives bond as to the persons name executor only. Court may wish to set bond at \$223,000 based on the estimated estate value. Petitioner is sole beneficiary of the will and signed waiver of bond. Judge to decide

3. Objections filed by Richard Reilly, however, not in proper format (see left side of file). Objections are not verified. Need proper written objections.

**Petition 2- Reilly; sister**

4. Petitioner does not indicate in section 2(d) of the petition a basis for bond an estimated value of the estate. Need to file verified supplement. **Supp: Petitioner has no information regarding the value of the estate, but will adopt, for the purposes of the court's consideration of this petition, the value of identified in the petition of carmine Cannarella.**
5. Need proof of publication.

**RECOMMENDATION:**

Need to clear notes and set for contested hearing. It appears petitioner Cannarella has higher priority than petitioner Reilly. A person who takes under the will has priority over a person who does not, but the court in its discretion may give priority to a person who does not take under the will if the person is entitled to a statutory interest that is a substantially greater portion of the estate than the devise to the person who takes under the will and the priority appears appropriate under the circumstances (Pr.C. §8441).

(kra/vet/cbr/gls/cbr/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800556

CASE NAME: COLLEEN LESLIE REILLY-LARSEN

**SEE ALSO 11 & 12**

HEARING:

Hearing re: Petition for Letters of Administration w/WA W/Full Authority under IAEA.

COUNSEL:

CARMINE A CANNARELLA (PET)...FULLERTON LEMANN SCHAEFFER & D  
COLLEEN. LESLIE REILLY-LARSEN (DEC)...  
DIANE REILLY (PET)...VOSS SILVERMAN & BRAYBROOKE

See notes on prior page (matter #12).

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800692

CASE NAME: RICHARD G. RUSKIN

HEARING:  
Petition to determine succession to Real Property

COUNSEL:  
FLORITA S. RUSKIN (PET)...ROBERT E. SUTTLE  
RICHARD G. RUSKIN (DEC)...

GENERAL INFORMATION:  
**Continued from 9/8/08 at request of counsel.**

THIS CASE IS SET FOR HEARING ON **Amended** Petition to determine succession to real property (estate \$100,000 or less)

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petitioner is surviving spouse of decedent and requests a 100% interest in decedent's real property intestate succession without administration.
2. Decedent leaves a spouse and 2 children and thus, under intestacy laws, the spouse would receive 1/3 and the children would divide 2/3. The children have signed the petition, however, the percentage distributions are set forth on Attachment 13 which is not signed. Need written stipulation or assignments of interest from each child if they are agreeable to the surviving spouse receiving 100%.

RECOMMENDATION:  
Need to clear note 2.  
(kra/cbr/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR  
HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800760

CASE NAME: JOHN ERIC KNABENBAUER

HEARING:  
Petition for SPOUSAL PROPERTY

COUNSEL:  
JEANETTE F KNABENBAUER (PET)...THOMAS W DOMINICK  
JOHN ERIC KNABENBAUER (DEC)...

GENERAL INFORMATION:  
Letters of administration issued to petitioner 9/29/08.

THIS CASE IS SET FOR HEARING ON spousal property petition

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Decedent died 2/11/89 and is survived by a spouse and 1 child.
2. Petitioner requests determination of decedent's property passing to the surviving spouse without administration and confirmation of property belonging to the surviving spouse.
3. Petitioner alleges that she and decedent were married in 1988 and that the real property located in Fontana, CA was acquired in 2001 and title was taken as husband and wife. Petitioner explains that the problem arises when petitioner executed a grant deed of her interest into decedent's name alone in 2005 in order for decedent to secure a loan for refinance and decedent failed to transfer the title back once the refinancing was completed. For all property acquired on or after 1-1-85 a transmutation of real or personal property is not valid unless made in writing by an express declaration that is made, joined in, consented to, or accepted by the spouse whose interest in the property is adversely affected. (Fam. C. § 852.) Need verified supplement.

RECOMMENDATION: Need to clear note.  
(kra)

FUTURE HEARING DATES:  
5/04/09 Hearing re: Inventory and appraisal  
12/07/09 Accounting Review



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800768

CASE NAME: PEARL A. RICKARD

HEARING:  
Spousal Property Petition hearing.

COUNSEL:  
RICHARD R. RICKARD (PET)...DEBRA S POPINEAU  
PEARL A. RICKARD (DEC)...

GENERAL INFORMATION:

**Continued from 10/1/08 at request of petitioner for petitioner to file an amended petition and give proper notice.**

THIS CASE IS SET FOR HEARING ON  
Spousal property petition.

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner/surviving spouse, seeks all of decedent's separate property on the basis of decedent's will naming petitioner as sole heir.
2. Petitioner checked box 1a indicating a determination of separate property passing but then both boxed 7a and 7b which would apply to the same plus a determination of decedent's community property passing to petitioner. The petitioner therefore is internally inconsistent. Need corrected petition or verified supplement explaining.
3. Need notice of hearing and proof of service for all persons listed in section 9 of petition.

RECOMMENDATION

Need to clear notes.  
(abs/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800802

CASE NAME: LASLIE D. LANGE

HEARING:

Hearing re: Petition for Letters of Testamentary With Full Authority Under IAEA..

COUNSEL:

LEA R. LANGE (PET)...SIRKIN LAW GROUP  
LESLIE D. LANGE (DEC)...

GENERAL INFORMATION:

**Continued from 10/16/08 for counsel to file supplement. Counsel to verify minor's age and verify assets. As counsel advises that petitioner is not bondable, Court will consider a blocked account in lieu of bond if the only asset is real property**

THIS CASE IS SET FOR HEARING ON Petition for Letters of Administration with full authority under IAEA

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Petition does not indicate age of sole minor heir. If minor is 12 or older minor may be noticed directly; if minor is under 12 years of age, will need as to minor's guardian of the estate.
2. Petitioner requests bond of \$102,000. Appears adequate. **Per minute order 10/16/08 Court may consider a blocked account in lieu of bond if the only asset is real property.**

RECOMMENDATION:

RFA subject to notes 1 & 2, no bond. If approved, set future hearings for filing of Inventory & Appraisal on **6/29/09** and for Accounting Review on **1/25/10**. Any accounting to be filed 30 days in advance. Note requirements of local rule 20-908.

(kra/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800908

CASE NAME: THE ANNE M. PIERSON LIVING TRUST

HEARING:

Petition for COMPELLING DAMAGES FOR BREACH OF TRUST BY TRUSTEE;  
AND COMPELLING TRUST ACCOUNTING

COUNSEL:

LEONARD COLLEMACINE (PET)...KEITH A DAVIDSON

No notes at this time as the file is currently in review by Legal Research.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: PROPS0800910

CASE NAME: THE HOWARD AND CAROL BURTON FAMILY

HEARING:

Petition for trustee and beneficiary to determine existence and validity of trust

COUNSEL:

LAURI ANNE VALENCIA (PET)...THOMAS W DOMINICK

No notes at this time as the file is currently in review by Legal Research.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS03854

CASE NAME: MTR OF MARGARET R RICHARDS

HEARING:  
Hearing re Final Discharge

COUNSEL:  
BARRIE S MAY (PET)...HARTNELL HORSPOOL & FOX  
MARGARET R RICHARDS (DEC)...  
LISA DAVIS (TP )...PRO/PER  
SANDRA MARIE RICHARDS (PRO/PER )...PRO/PER

GENERAL INFORMATION:  
Order for Final Distribution granted 8/9/07  
**Continued from 8/14/08 and 10/16/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON filing receipts and final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need to file receipts and submit final discharge declaration.

RECOMMENDATION:

Find out status.  
(gls/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS05497

CASE NAME: MTR RE JOE CRUZ GUTIERREZ

**SEE ALSO 20**

HEARING:  
Hearing Re: DISMISSAL OF OBJECTIONS

COUNSEL:

GARFIELD L LOGAN (PET)...GARFIELD L LOGAN  
JOE CRUZ GUTIERREZ (DEC)...  
JOE FRANK GUTIERREZ (TP )...JOHN G WURM  
ROBERT GUTIERREZ (BRYAN C. HARTNELL )...BRYAN C.  
STEVE M GUTIERREZ (PRO/PER )...PRO/PER  
VICTIM COMPENSATION & GOVERNME(PRO/PER )...PRO/PER

GENERAL INFORMATION:

**Continued from 10/9/08 for Ms. Carrillo to file objections.**

THIS CASE IS SET FOR HEARING ON re Dismissal of Objections

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. At Court trial on 7/25/08, the court continued the issue of Status of Objections; Dismissal of Objections and Accounting and Report of Settlement. Counsel agree that a new accounting shall be filed and the old accounting withdrawn.

RECOMMENDATION:

Find out status.  
(gls/cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS05497

CASE NAME: MTR RE JOE CRUZ GUTIERREZ

**SEE ALSO 19**

HEARING:

Hearing Re: FINAL ACCOUNT & RPT OF ADMIN/PETN FOR SETTLEMENT

COUNSEL:

GARFIELD L LOGAN (PET)...GARFIELD L LOGAN  
JOE CRUZ GUTIERREZ (DEC)...  
JOE FRANK GUTIERREZ (TP )...JOHN G WURM  
ROBERT GUTIERREZ (BRYAN C. HARTNELL )...BRYAN C.  
STEVE M GUTIERREZ (PRO/PER )...PRO/PER  
VICTIM COMPENSATION & GOVERNME(PRO/PER )...PRO/PER

GENERAL INFORMATION:

**Continued from 10/9/08 to file proof of proper notice of hearing; proof of payment to Victim Compensation Board; and file new distribution proposal.**

THIS CASE IS SET FOR HEARING ON Final Account and Report and Petition for Final Distribution

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Petitioner alleges that no creditor's claims have been filed. Rita Carrillo, a beneficiary, verbally informed the court that she wished to make a claim for reimbursement of funeral expenses. Petitioner filed a petition for denial of creditor's claim, and on 12/9/05, the court held that since no creditor's claim was filed, the petition was found to be premature. However, petitioner was granted full authority under I.A.E.A. and petitioner has the power to allow a claim after the expiration of the time for filing the claim (Pr.C. §10552). Petitioner does not indicate the amount of the funeral expenses being requested as reimbursement.
2. Attorney requests statutory fees of \$7,745.31. Ok.

3. Attorney requests extraordinary fees of \$13,641.45, together with costs in the amount of \$4,226.95, for services rendered in preventing foreclosure and arranging the sale of the estate real property. Billed at \$300/hour for attorney time and \$75-125/hour for paralegal time for a total of 136.3 hours. Need qualifications of paralegal per CRC 7.703. File verified supplement.
4. During the estate administration, petitioner hired the law offices of Paul Brennan to represent the estate in litigation re ownership of real property. Petitioner paid fees of \$11,977.00 which has not been paid. Billed at \$295/hour for 40.60 hours. Itemized. JTD
5. Petitioner requests authority to withhold \$1,500 for closing costs.
6. Petitioner makes no allegation pursuant to Pr.C. §216 (re incarcerated heir). In addition, the Victim's Compensation and Government Claims Board has filed their lien on 2/22/08 in the amount of \$1,200 against Steven Gutierrez. Need proof of payment.
7. The distribution portion of the petition (set forth on Exhibit "B") should be corrected to account for the payment described in note 7. File new distribution proposal.

**RECOMMENDATION:**

Need to clear notes.

(gls)



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS05512

CASE NAME: EST OF CAROLYN SUE GILMOUR

HEARING:  
Hearing re Final Discharge

COUNSEL:  
KRISTIN DAWN ADAMS (PET)...C.L. FARRELL  
CAROLYN SUE GILMOUR (DEC)...

GENERAL INFORMATION:  
**Continued from 10/9/08 at request of counsel. Nothing new filed.**

THIS CASE SET FOR HEARING ON Final Discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Receipt of administrator/sole heir filed.
2. Need Ex Parte Petition For Final Discharge And Order.

RECOMMENDATION

Inquire status. When receipts or final discharge order are not filed as ordered, court may set a hearing in accord with Pr.C. § 8505.

(cbr)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS06544

CASE NAME: ESTATE OF SOCORRO A LOPEZ

**SEE ALSO 23 & 24**

HEARING:  
Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

EDWARD LOPEZ (PET)...JAMES B CHURCH  
SOCORRO A LOPEZ (DEC)...  
DEPARTMENT OF HEALTH SERVICES (TP )...PRO/PER  
RONALD W. ASK (RONALD W ASK )...RONALD W  
ENEDINA LOPEZ (PRO/PER )...PRO/PER  
MARIA LOPEZ-CARSON (PRO/PER )...PRO/PER

**Note: The buyers are intestate heirs of the estate. Petitioner obtained order authorizing a partition action; however, after obtaining the order, one of decedent's children who owns a 25% interest in this property offered the full appraisal value and petitioner believes this sale will have a greater net value to the estate than proceeding with the partition action.**

Address	1/4 <b>interest</b> 719408 Jurupa Ave., Bloomington, CA
Appraised value	\$85,000 as of 5/1/08
Sale price	\$85,000
First overbid	\$89,750
Deposit	\$8,500
Commission	Sale without broker

Additional bond	None. <b>Net proceeds to be placed in a blocked account. Court to set review date for proof of blocked account.</b>
Reason for sale	To pay debts, expenses of administration and taxes
Exposure to market	MLS, advertising and open house
Notice	<b>Need to file proof of publication on notice of sale.</b>

FUTURE HEARING DATES:  
3/23/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

-----  
DATE: 11/17/08 TIME: 9:00 DEPT: E2  
-----

CASE #: SPRSS06544

CASE NAME: ESTATE OF SOCORRO A LOPEZ

**SEE ALSO 22 & 24**

HEARING:  
Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

EDWARD LOPEZ (PET)...JAMES B CHURCH  
SOCORRO A LOPEZ (DEC)...  
DEPARTMENT OF HEALTH SERVICES (TP )...PRO/PER  
RONALD W. ASK (RONALD W ASK )...RONALD W  
ENEDINA LOPEZ (PRO/PER )...PRO/PER  
MARIA LOPEZ-CARSON (PRO/PER )...PRO/PER

**Note: The buyers are intestate heirs of the estate. Petitioner obtained order authorizing a partition action; however, after obtaining the order, one of decedent's children who owns an interest in the adjoining properties offered the full appraisal value and petitioner believes this sale will have a greater net value to the estate than proceeding with the partition action.**

Address	<b>100% interest</b> 719412 Jurupa Ave., Bloomington, CA
Appraised value	\$42,000 as of 5/1/08
Sale price	\$42,000
First overbid	\$44,600
Deposit	\$4,200
Commission	Sale without broker

Additional bond	None. <b>Net proceeds to be placed in a blocked account. Court to set review date for proof of blocked account.</b>
Reason for sale	To pay debts, expenses of administration and taxes
Exposure to market	MLS, advertising and open house
Notice	<b>Need to file proof of publication on notice of sale.</b>

FUTURE HEARING DATES:  
3/23/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
-----

CASE #: SPRSS06544

CASE NAME: ESTATE OF SOCORRO A LOPEZ

**SEE ALSO 22 & 23**

HEARING:  
Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

EDWARD LOPEZ (PET)...JAMES B CHURCH  
SOCORRO A LOPEZ (DEC)...  
DEPARTMENT OF HEALTH SERVICES (TP )...PRO/PER  
RONALD W. ASK (RONALD W ASK )...RONALD W  
ENEDINA LOPEZ (PRO/PER )...PRO/PER  
MARIA LOPEZ-CARSON (PRO/PER )...PRO/PER

**Note: The buyers are intestate heirs of the estate. Petitioner obtained order authorizing a partition action; however, after obtaining the order, one of decedent's children who owns a 25% interest in this property offered the full appraisal value and petitioner believes this sale will have a greater net value to the estate than proceeding with the partition action.**

Address	1/4 <b>interest</b> 719422 Jurupa Ave., Bloomington, CA
Appraised value	\$21,250 as of 5/1/08
Sale price	\$21,250
First overbid	\$22,812.50
Deposit	\$2,125
Commission	Sale without broker

Additional bond	None. <b>Net proceeds to be placed in a blocked account. Court to set review date for proof of blocked account.</b>
Reason for sale	To pay debts, expenses of administration and taxes
Exposure to market	MLS, advertising and open house
Notice	<b>Need to file proof of publication on notice of sale.</b>

FUTURE HEARING DATES:  
3/23/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS55922

CASE NAME: IN THE MATTER OF JOHN ALMAGER JAIMEZ

**SEE ALSO 25A**

HEARING:  
Hearing Re: STATUS REPORT

COUNSEL:  
JOHN ALMAGER JAIMEZ (DEC)...  
SUSAN CASTRO (PET)...JUDITH L HUBERT

GENERAL INFORMATION:

On 4/3/08, the court removed Sandra Castro as administrator and appointed the Public Administrator and set this hearing for status. Successor Letters of Administration issued 5/23/08.

**Continued from 10/9/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Status

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. A Final Inventory is filed.
2. An accounting is due from the prior administrator Sandra Castro for the period covering 2/1/91 – 4/3/08. Does court wish to set OSC re accounting review for Sandra Castro?

RECOMMENDATION:

Find out status of the administration. Court may wish to set OSC re accounting review for Sandra Castro.

(gls)



CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS55922

CASE NAME: IN THE MATTER OF JOHN ALMAGER JAIMEZ

***SEE ALSO 25***

HEARING:  
STATUS & Account and Report of SUSAN CASTRO and Petition for allowance of fees  
filed.

COUNSEL:  
JOHN ALMAGER JAIMEZ (DEC)...  
SUSAN CASTRO (PET)...JUDITH L HUBERT

**A-O HRG**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 9:00 DEPT: E2  
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CASE #: SPRSS56284

CASE NAME: ESTATE OF DOROTHY LEE BOWEN

HEARING:  
Hearing re Final Discharge

COUNSEL:

RUTH HENRICKS	(SA )...HARTNELL LISTER & MOORE
DOROTHY LEE BOWEN	(DEC)...
RICHARD RAINEY	(SA )...
DENNIS LANKFORD	(TP )...PRO/PER

GENERAL INFORMATION:

Order for Final Distribution granted on 2/15/07

Continued from **2/21/08** at request of counsel to locate beneficiaries. Nothing new filed.

Continued from **5/29/08** and **6/30/08** at request of counsel. Nothing new filed.

**Continued from 8/4/08 and 10/6/08 at request of counsel. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON filing receipts and final discharge

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Need to file receipts and submit final discharge

RECOMMENDATION:

Find out status.

(/gls/kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

**CONSERVATORSHIP**

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DATE: 11/17/08 TIME: 10:30 DEPT: E2  
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CASE #: CONPS0700040

CASE NAME: MARY JANE BEADLE

**SEE ALSO 27A**

HEARING:  
Accounting Review

COUNSEL:  
DAVID KUHN (CPE)...C. WILLIAM NYMAN  
MARY JANE BEADLE (CEP)...JAMES B CHURCH

No file available for review.

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 10:30 DEPT: E2  
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CASE #: CONPS0700040

CASE NAME: MARY JANE BEADLE

***SEE ALSO 27***

HEARING:

Conservatorship Compliance Review Hearing on PETITION FOR  
CONSERVATORSHIP of DAVID KUHN

COUNSEL:

DAVID KUHN (CPE)...C. WILLIAM NYMAN  
MARY JANE BEADLE (CEP)...JAMES B CHURCH

**A-O**

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 10:30 DEPT: E2  
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CASE #: CONPS0700298

CASE NAME: MILDRED COMFORT GILLILAND

HEARING:

Hearing re: Inventory and appraisal

COUNSEL:

SHERWYN R GILLILAND (CPE)...PRO/PER

MILDRED COMFORT GILLILAND (CEP)...JAMES B CHURCH

GENERAL INFORMATION:

**Continued from 10/9/08 for filing of corrected or supplementary I&A and notice of hearing and for referral to PG. Clerk noticed PG. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON Filing Inventory and Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED:

1. Order Appointing Conservator granted 7/1/08, with requirement of \$40,000 bond. Bond was posted on 5/20/08. **However, Letters of Conservatorship are not yet issued. Check returned on 10/06 for \$26 re certified letters, as letters have never been submitted. Need letters.**
2. Final Inventory is filed. However, Attachment 2 lists real and personal property which are not valued. Need corrected inventory or supplemental inventory. In addition, need to file notice of filing inventory and of how to object to inventory per Pr.C. §2610.

RECOMMENDATION:

Need corrected/supplemental inventory as well as notice of filing inventory and notice how to object.

(gl/cbr/kra)

FUTURE HEARING DATES:

6/04/09 Accounting Review

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 10:30 DEPT: E2  
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CASE #: SC SS01236

CASE NAME: IN THE MATTER OF JEREMY KEN PUGEL

HEARING:  
Conservatorship Compliance Review

COUNSEL:

JEREMY KEN PUGEL	(CEP)...SHERRI L KASTILAHN
VIRGIE LEE EARLS S	(CPE)...PRO/PER
JOSEPH EARLS	(PET)...SHERRI L KASTILAHN
ANDREA WILLIS	(PET)...SHERRI L KASTILAHN

GENERAL INFORMATION:  
Conservatorship of the person only granted 4/14/08.

THIS CASE IS SET FOR HEARING ON Compliance review

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Need proof of service of a copy of the Order for Conservatorship with Notification of Conservatee's rights per Pr.C.§1830(c).
2. Need Statement of Care Plan in accord with Pr.C.§2352.5.
3. Need Court Investigator 6 month report per Pr.C.§1850(a)(1)

RECOMMENDATION  
Inquire status.  
(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR  
HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 10:30 DEPT: E2  
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CASE #: SC SS01960  
CASE NAME: MATTER OF AURORA ROMERO ROMERO

HEARING:

THIRD Account and Report of BETTY ROMERO SARENANA and Petition for fees  
COUNSEL:

BETTY ROMERO SARENANA (CPE)...PRO/PER  
ROSALINDA ROMERO MANCHESTER (CPE)...PRO/PER  
AURORA ROMERO ROMERO (CEP)...MELVIN L FRIEDLAND

GENERAL INFORMATION: Matter came on for hearing re Accounting review on 10/6/08. Court notes that Betty Serenana called the court to say that she could not appear and that she was faxing documents to attach to her accounting. Court notes that the schedules received by the court are not in the proper format and orders matter continued for Ms. Sarenana to file the accounting in the proper format or to file a waiver of accounting. It appears that the Accounting review was continued by the courtroom and subsequently vacated upon the filing of the above noted documents. Thus no new accounting has been filed and the notes below reflect the first accounting filed.

THIS CASE IS SET FOR HEARING ON 3<sup>rd</sup> account current and petition for fees filed 10/6/08

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers March 2007 to March 2008.
2. As the summary of account is incomplete and there are no supporting schedules, it cannot be determined whether or not this accounting balances. Need to file proper accounting to comply with Pr.C. §1060 et seq.
3. Assets of this estate appear to be under \$500,000, there is no income from real property and no interest in trade or business, petitioner has used the simplified method of reporting in that receipts and disbursements are not categorized. As the simplified method has been used petitioner must use forms GC400(SUM), GC405(A) and GC405(C). Please file amended accounting using the proper forms.
4. Need notice of hearing and proof of service including notice on the Veteran's Administration.

RECOMMENDATION: Need a proper accounting and notice.

(kra)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 10:30 DEPT: E2  
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CASE #: SC SS02968

CASE NAME: MTTR OF MARGARITA PACHECO

**SEE ALSO 32**

HEARING:  
Hearing re: Inventory and appraisal

COUNSEL:  
EMILY MORALES (CPE)...CYNTHIA A DUNNING  
MARGARITA PACHECO (CEP)...LENITA A SKORETZ

GENERAL INFORMATION:

On 3/3/06, court appointed petitioner as conservator of the person and estate and fixed bond at \$82,000. Letters and bond have not been issued/posted.  
Continued from **several times since 4/26/07** and then from **8/21/08** at request of counsel. Court notes on 11/1/07 that conservatee died on 10/9/07. Also, Court finds that there is money on deposit with the County of SB in SCVSS120370 and order that those funds are NOT to be released by the County except by order of this Court.  
**Continued from 10/9/08 as notes have not been cleared, Court directs all parties to be present at the next hearing. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON filing Inventory and Appraisal

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED;

1. Final I&A filed. However, items 1-4 listed on attachment 1 are not cash items and must be appraised by the probate referee. Also, remaining items 5-9 appear to be income after date of appointment and should be accounted for in the accounting and not made a part of the inventory at the time of appointment. Need Corrected I&A.
2. Statement re bond on the I&A indicates the bond of \$82,000 is insufficient. The appraisal value of the I&A filed is \$98,358; however, a corrected I&A needs to be filed (see note 1). Does court wish to set hearing re OSC re bond sufficiency?



3. Need proof of service of Inventory & Appraisal including Instructions for Objection per Pr.C.§2610.
4. Need return of Citations. Service completed 2/13/08.

RECOMMENDATION:

Need to clear notes.

(/gls/cbr/kra/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 10:30 DEPT: E2  
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CASE #: SC SS02968

CASE NAME: MTTR OF MARGARITA PACHECO

**SEE ALSO 31**

HEARING:  
FIRST AND FINAL Account and Report of EMILY MORALES and Petition for fees

COUNSEL:  
EMILY MORALES (CPE)...CYNTHIA A DUNNING  
MARGARITA PACHECO (CEP)...LENITA A SKORETZ

GENERAL INFORMATION

Continued from 4/24/08 and 8/21/08 at request of counsel.

**Continued from 10/9/08 for all parties to be present. Nothing new filed.**

THIS CASE IS SET FOR HEARING ON 1st & final account

THE FOLLOWING ISSUES AND/OR DEFICIENCIES IN THE PAPERS ARE NOTED-

1. Accounting period covers 3/3/06 – 10/31/07. Petition's caption is first & final account current and report of Conservator. The final account must include an accounting for the period that ended on the date of death and a separate accounting for the period subsequent to the date of death per Pr.C. §2620. However, the report does not indicate when conservatee died. Need proper accounting.
2. There is no summary of account, receipt or property on hand schedules. It cannot be determined whether or not this accounting balances. Need to file proper accounting to comply with Pr.C. §1060 and using the proper forms (see following note).
3. Assets of this estate are under \$500,000, there is no income from real property and no interest in trade or business, petitioner has used the simplified method of reporting in that receipts and disbursements are not categorized. As the simplified method has been used petitioner must use forms GC400(SUM), GC405(A) and GC405(C). Please file amended accounting using the proper forms.

4. Petitioner waives compensation.
5. As this is a final account, need proposed distribution. File verified supplement.
6. **Amended accounting is filed, however, does not clear prior notes 1-5.**

RECOMMENDATION: Need to clear notes.  
(kra/gls)

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN

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DATE: 11/17/08 TIME: 10:30 DEPT: E2  
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CASE #: VC VS00550

CASE NAME: MATTER OF ESTHER ALICE TUCKER

HEARING:  
Report Sale and Petition for Order Confirming Sale of Real Property.

COUNSEL:

FRANKLIN WALKER (PET)...GABRIELLE R RANDELL  
CLINTON WALKER (PET)...GABRIELLE R RANDELL  
ESTHER ALICE TUCKER (CPE)...ANNETTE G DEBELLEFEUILLE  
ATLAS INTERNATIONAL & ASSOCIAT(TP )...WENDY L. MATTHEWS

Address	10461 Hesperia Ave., Hesperia, CA 92345
Appraised value	\$155,000 as of 7/22/08.
Sale price	\$140,000 or
First overbid	\$147,500
Deposit	\$2,000. <b>Insufficient. Deposit must be 10% of the purchase prices unless the sale is VA or FHA financed.</b>
Commission	\$8,400 (6%) payable to Debi Adams, Shear Realty
Additional bond	\$25,000 <b>Court may wish to set review date for proof of bond.</b>
Reason for sale	To pay debts and expenses
Exposure to market	MLS and newspaper advertising
Notice	<b>Need to file notice of hearing and proof of service</b>

CIVCAL4 Superior Court - Redlands - Probate  
PROBATE/GUARDIANSHIP/CONSERVATORSHIP CALENDAR

HONORABLE JUDGE CYNTHIA LUDVIGSEN **MISC.**

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DATE: 11/17/08 TIME: 1:30 DEPT: E2  
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CASE #: VPRVS02184

CASE NAME: MTTR OF THE BAXTER LIVING TRUST

**OUT FOR READINESS ON 11/13/08.**

HEARING:  
Court Trial set for PETITION of BARBARA BAXTER GUERRY

COUNSEL:

BARBARA BAXTER GUERRY	(PET)...	PRO/PER
DONALD EARL BAXTER	(PET)...	JULIA M WOOD
LILLIE MAE BAXTER	(DEC)...	
LESLIE WALTER BAXTER	(DEC)...	
DONALD E BAXTER	(PET)...	GREGORY J HOUT
BARBARA GUERRY	(PET)...	CALDWELL, KENNEDY & PORTER, A.
PAMELA YVONNE BAXTER	(OBJ)...	SHERRI L KASTILAHN
BARBARA GUERRY	(CHRISTOPHER ALLAN BURY	)...CHRISTOPH

No calendar notes as this is on for Court Trial.